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FinancialPlanning

Wealthtech Weekly

February 26, 2026

By Rob Burgess
Reporter

The FPA and Snappy Kraken announced this week that they **will be partnering to revamp** the two-decade-old FPA PlannerSearch platform. Among the upgrades? Increased visibility in AI search results, a development that the industry has been watching closely as **SEO rules are being rewritten**.

Also, this week:

- Ask an Advisor: **What mistake made you better?**
- Wealth Think from Altruist CEO Jason Wenk: **AI is taking advisor jobs. It doesn't have to take yours.**
- How can advisors help **clients who become unexpected caregivers?**

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TOP STORIES

ARTIFICIAL INTELLIGENCE

FPA to refresh advisor search for AI age with Snappy Kraken

The revamped platform will be available by late summer and feature several upgrades, including a greater ability to be discovered by artificial intelligence search results.

- **Ask an Advisor: What mistake made you a better advisor?**
  Advisors are only human, and mistakes are bound to happen. But missteps, for all the pain they can cause, can also help an advisor — and their practice — grow stronger.
- **What the SCOTUS Trump tariff decision means for portfolios**
  The 6-3 Supreme Court ruling against one of President Donald Trump's signature economic policies was consequential, but experts say volatility is

unlikely to be over.

- **How advisors should guide clients who become unexpected caregivers**
  Financial advisors have critical roles for modifying financial plans to cover costs and long-term plans when clients find themselves faced with caring for a family member.
- **AI is taking advisor jobs. It doesn't have to take yours**
  Showing up for clients is still crucial, but using AI to deliver on financial goals matters more, says Altruist's CEO.

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